

MyTRS Training

For Security Administrators

AGENDA

2:45 – 3:30 p.m.

Part 1: Managing existing users

- Day One in MyTRS
- Ongoing maintenance

Part 2: Adding new employer users

- Adding an existing MyTRS contact as a user
- Adding a new MyTRS user who is not already a contact

JULY 2010

Devens

Tuesday, July 13

Taunton

Thursday, July 15

Cambridge

Friday, July 16

Holyoke

Tuesday, July 20

Danvers

Thursday, July 22

Hyannis

Tuesday, July 27

Worcester

Thursday, July 29

Cambridge

Friday, July 30

MTRS PRESENTERS AND STAFF

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Mary Lynn Chu, Service Representative, Employer Services
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Lachelle Drayton, Service Representative, Employer Services
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VITECH, INC. STAFF

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Agenda

Part 1 Managing existing employer users

- Day One in MyTRS
- Ongoing maintenance

Part 2 Adding new employer users


- Adding an existing MyTRS contact as a user
- Adding a new MyTRS user who is not already a contact



Part 1

Managing existing employer users





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Day One in MyTRS

- All of your current contacts will be added to MyTRS as **contacts** and **users**
- On Day One, all users' access will be the same:
 - **Employer read-only user role**, giving each user read-only rights
 - **Suspended** until you "unsuspend" the users' accounts, allowing them to access MyTRS
- Security administrators will need to:
 - Determine each user's role and update his or her security rights
 - Remove the suspended status from each user account
- Initially, all employer contacts will be users; security administrators will add new users as needed


- To make it easier for you to establish your employer contacts as users, your district's most current list of contacts has been uploaded to MyTRS.
- Accordingly, all of your employer contacts will be set up as users and will be assigned to a user group with read-only access. You will have to decide if they should have additional access rights and update MyTRS accordingly.
- Initially all users will have **no** access to MyTRS as their accounts will be "suspended."
- To grant your users access, you must "unsuspend" their accounts and update their access rights.



MyTRS access is based on role

- Roles that have been defined:
 - **Employer Security Administrator:** Can access all MyTRS functionality and maintains user set up and security (including assigning roles)
 - **Employer User:** Can access all **non-security** MyTRS functionality, but cannot access user set up and security
 - **Employer Read-Only User:** Can access all non-security MyTRS functionality as read-only
 - Initially, all non-security administrator users will have read-only access until the security administrator updates user access

- After you log in, your access and read/write capabilities are based on your role.
- The Security Administrator will determine each user's role and can also tailor access for individual users.



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Administrative terminology: Contact vs. User

- **Contact** is created in MyTRS with a person's name, title, role and contact information
 - A contact does not have to be a user
- **User** is created in MyTRS in order to give an individual access to the application
 - A user must be a contact
 - If a contact does not exist in MyTRS and he or she should be a user, the contact record is created as a result of creating the user

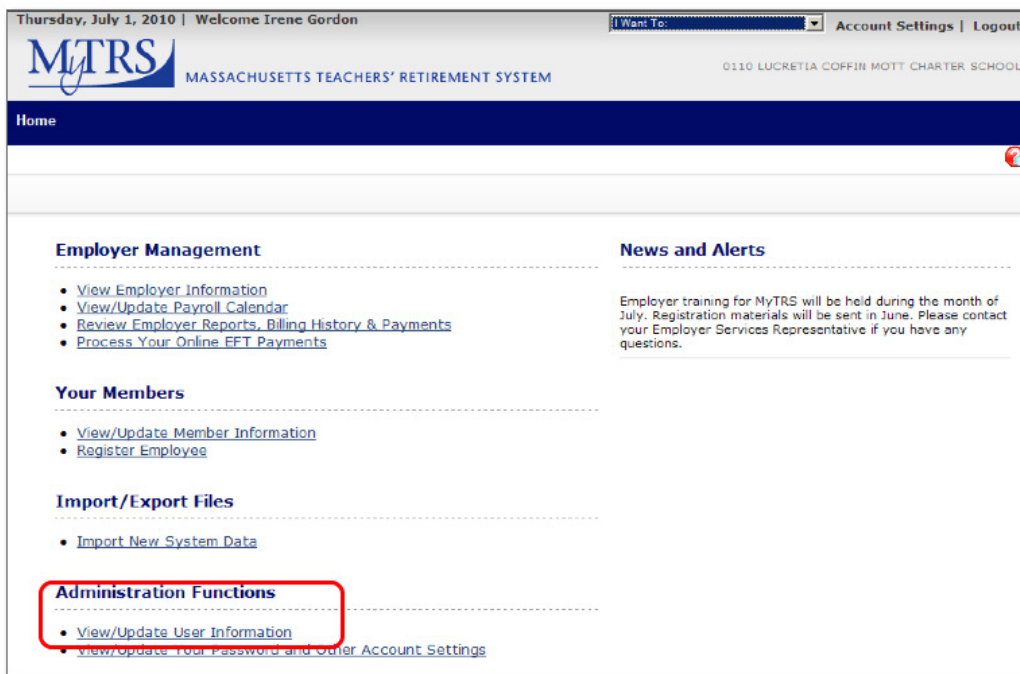
- An employer contact is someone who either works for a school district, or is involved in its reporting of MTRS deduction data. If a contact has permission to access MyTRS, he or she is also an employer user. Employer users manage their employees' MyTRS data by:
 - updating member event information,
 - importing and submitting deduction report files to the MTRS,
 - registering new employees with the MTRS,
 - generating and assigning payments, and
 - maintaining user access to MyTRS (security administrators).

Part 1: Managing existing employer users

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View/Update user information

- Click **View/Update User Information** on the *Home* page

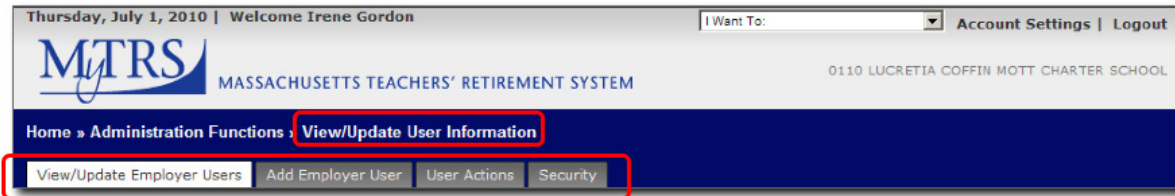


- We will review the security administrator functions that are performed from the **View/Update User Information** link located under the Administration Functions category on the MyTRS *Home* page.
- The **View/Update User Information** link is only available to security administrators.
- Using the security functionality, security administrators maintain MyTRS user profiles and user access rights.

Part 1: Managing existing employer users

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View/Update user information

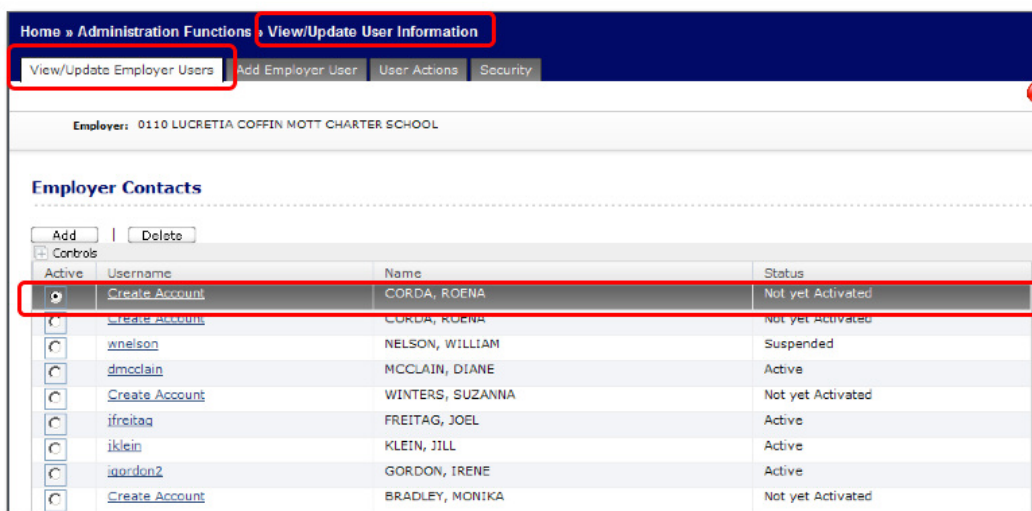


- Four tabs:
 - **View/Update Employer Users:**
launching point for adding/maintaining users
 - **Add Employer User:**
establishing access for users
 - **User Actions**
 - **Security:**
granting read and write access to users

Part 1: Managing existing employer users

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Day one in MyTRS



- **Reinstate** user access to MyTRS by releasing the account from a suspended status
- **Assign** user roles and priorities
- **Manage** user security levels

- Navigate to the **View/Update User Information** window, and click the Username in the Employer Contacts section.

Part 1: Managing existing employer users

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Maintaining employer user information

Home » Administration Functions » **View/Update User Information**

View/Update Employer Users | Add Employer User | User Actions | Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Employer Contacts

|

Active	Username	Name	Status
<input type="checkbox"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="checkbox"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="checkbox"/>	wnelson	NELSON, WILLIAM	Suspended
<input type="checkbox"/>	dmcclain	MCCLAIN, DIANE	Active
<input type="checkbox"/>	Create Account	WINTERS, SUZANNA	Not yet Activated
<input type="checkbox"/>	jfreitag	FREITAG, JOEL	Active
<input type="checkbox"/>	jklein	KLEIN, JILL	Active
<input type="checkbox"/>	igordon2	GORDON, IRENE	Active
<input type="checkbox"/>	Create Account	BRADLEY, MONIKA	Not yet Activated

- Changing a user password
- Unlocking a locked account
- Suspending (reinstating) user access to MyTRS
- Assigning user roles and priorities
- Managing user security levels

Part 1: Managing existing employer users

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Using the View/Update window



- Reset a password; unlock an account
- To suspend a user, check the **Suspended** checkbox for the desired Application; uncheck this box to reinstate access to MyTRS
- Assigning access and read/write capabilities; access is based on user's role:
 - **Employer Security Administrators** can access all MyTRS functionalities
 - **Employer Users** can access all MyTRS functionalities except user set up and security
 - **Employer Read-Only Users** can access all MyTRS windows in read-only mode
- If more than one role exists, the role with the lowest priority takes precedence



- The security administrator resets a user's password when the user does not know his or her username and e-mail address associated with the account.
 - Click **Change** to display the New Password and Confirm New Password fields.
 - Check the Reset Password checkbox to require the user to create a new password the next time he or she logs in to MyTRS.
- The user's account will lock automatically after three failed attempts to log in to MyTRS. Deselect the Lock Account checkbox to unlock the account.
- The security administrator can suspend the user's access to MyTRS by checking the Suspended checkbox for the Employer Self Service application in the Application section. The user is prevented from logging in to MyTRS until the Suspended checkbox is cleared.
- Check or uncheck the Suspended checkbox and click **Save**.
- A user's access is controlled by their role and the priority level associated with the role. In the example above, Employer User would take precedence over Employer Administrator.
- The role with the lowest priority number controls a user's access.

Home » Administration Functions » View/Update User Information

View/Update Employer Users | Add Employer User | User Actions | Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Messages(1)
The user information has been updated.

User Details

Username: wnelson
 Password: *****(Change)
 Type: Employer Business *
 Reset Password Flag: ☒
 Lock Account: ☐
 Workflow Access: ☒

Title:
 SSN:
 Prefix: Mr.
 First Name: William *
 Middle Name:
 Last Name: Nelson *
 Suffix:
 Birth Date: / /
 Gender: ☐ Female ☐ Male

Application

Application	Suspended
Employer Self Service	<input checked="" type="checkbox"/>

Business Entity List

Active	Employer Name	Contact Role
<input checked="" type="checkbox"/>	0110-LUCRETIA COFFIN MOTT CHARTER SCHOOL	Superintendent *

User Groups

Employer Self Service | Add | Delete

Active	Department Name	Priority
<input checked="" type="checkbox"/>	Employer Read Only User	100
<input type="checkbox"/>	Employer User	110

* Universal Role

Subscriptions

Display Name
<input checked="" type="checkbox"/> News

Save | Delete

- The window displays the selected user's information. The **View/Update Employer Users** window contains the following sections:
 - **User Details:** Username, password, first name and last name of the user are maintained in this section.
 - **Application:** For MyTRS users, the application is always Employer Self Service.
 - **Business Entity List:** The employer whose records this user can access.
 - **User Groups:** User roles are defined here (e.g., Employer User, Employer Administrator).
 - **Subscriptions:** This field cannot be edited by an employer
- To allow the user to access MyTRS for the first time, the security administrator will have to uncheck the Suspended checkbox and determine the user groups for this user (i.e., user role).



Demonstration 1

Maintaining existing users

Step 1: Viewing and updating user account.

Home » Administration Functions » View/Update User Information

View/Update Employer Users Add Employer User User Actions Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Messages(1)
The user information has been updated.

User Details

Username:

Password: (Change)

Type:

Reset Password Flag: ☒

Lock Account: ☐

Workflow Access: ☒

Title:

SSN:

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Birth Date:

Gender: ☒ Female ☐ Male

Application

Application	Suspended
Employer Self Service	<input checked="" type="checkbox"/>

Business Entity List

Active	Employer Name	Contact Role
<input checked="" type="checkbox"/>	0110-LUCRETIA COFFIN MOTT CHARTER SCHOOL	<input type="text" value="Superintendent"/>

User Groups

Employer Self Service

Active	Department Name	Priority
<input checked="" type="checkbox"/>	Employer Read Only User	<input type="text" value="100"/>
<input type="checkbox"/>	Employer User	<input type="text" value="110"/>

* Universal Role

Subscriptions

Controls	Display Name
<input checked="" type="checkbox"/>	News

- For each of your users:
 - Uncheck the Suspended box in the Application section.
 - Review the user's role. If the person...
 - Should have read-only access-do nothing.
 - Should have the role of Employer User, change the priority on the Employer User line to a number lower than the Read Only user role. In this example change the employer user priority to 90.
- Determine if there are any additional security settings you would like to establish for each user.

Demonstration 1: Maintaining existing users (continued)

Step 2: Resetting a password and unlocking an account.

The screenshot shows the 'View/Update User Information' page for the employer '0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL'. The page is divided into two main sections: 'User Details' and a lower section for personal information.

User Details Section:

- Username:
- Password:
- Confirm Password:
- Type:
- Reset Password Flag: ☒
- Lock Account: ☒
- Workflow Access: ☒

Personal Information Section:

- Title:
- SSN:
- Prefix:
- First Name:
- Middle Name:
- Last Name:
- Suffix:
- Birth Date:
- Gender: ☐ Female ☐ Male

An inset window titled 'User Details' is shown on the right, highlighting the 'Password' field with a red circle and the '(Change)' link next to it.

- The security administrator resets a user's password when the user does not know the username and e-mail address associated with his or her account.
 - Click Change to display the New Password and Confirm New Password fields.
 - Check the Reset Password checkbox to require the user to create a new password the next time he or she logs in to MyTRS.
- The user's account will lock automatically after three failed attempts to log in to MyTRS. To unlock the account, deselect the Lock Account checkbox.

Demonstration 1: Maintaining existing users (continued)

Step 3: Assigning user roles and priorities.

User Groups

Employer Self Service [v] [Add] [Delete]

+ Controls

Active	Department Name	Priority
<input type="radio"/>	Employer Read Only User	100
<input type="radio"/>	Employer User	110
<input checked="" type="radio"/>	Default User 2	120

* Univer Default User 2

Subscrip

- Employer Administrator
- Employer User - Employer Services
- Employer User - IT DBA
- Role1 - Member Services

- Access and read/write capabilities are based on the user's role:
 - **Employer Security Administrators** can access all MyTRS functionality.
 - **Employer Users** can access all MyTRS functionality except user set up and security.
 - **Employer Read-Only Users** can access all MyTRS windows in read-only mode.
- The role with the **lowest** priority number controls a user's access, and, if a particular user has more than one role, his or her access will be based on the role with the lowest priority number.
- A user's access is controlled by his or her role and the priority level associated with the role. In the example above, Employer User (with a priority number of 110) would take precedence over Employer Administrator (priority number 120).

Demonstration 1: Maintaining existing users (continued)

Step 4: Additional security: Selecting a user.

The screenshot shows the 'View/Update User Information' page in the MyTRS system. The breadcrumb trail is 'Home » Administration Functions » View/Update User Information'. Below the breadcrumb, there are four tabs: 'View/Update Employer Users', 'Add Employer User', 'User Actions', and 'Security'. The 'Security' tab is selected and highlighted with a red circle. Below the tabs, there is a section titled 'Users'. Under 'Users', there is a pull-down menu. The menu is open, showing a list of users: APPLEBAUM, AMANDA; BRENT, JOLI; FREITAG, JOEL; GORDON, IRENE; KLEIN, JILL; MCCLAIN, DIANE; and NELSON, WILLIAM. The user 'NELSON, WILLIAM' is selected and highlighted with a red circle.

- Navigate to View/Update User Information > Security.
- Use the pull-down menu and select the user.

Demonstration 1: Maintaining existing users (continued)

Step 5: Additional security: Selecting permissions.

Home » Administration Functions » View/Update User Information

View/Update Employer Users Add Employer User User Actions **Security**

Users

NELSON, WILLIAM

Menu Items

Active	Internal Name	Display Name	Permission Code
<input checked="" type="checkbox"/>	SS_EMPLOYER_MANAGEMENT_MENU	Employer Management	Writable
<input type="checkbox"/>	SS_EMPLOYER_MEMBER_MENU	Your Members	Writable
<input type="checkbox"/>	SS_EMPLOYER_ITEM_IMPORT_EXPORT	Import/Export Files	Writable
<input type="checkbox"/>	SS_EMPLOYER_ADMIN_MENU	Administration Functions	Writable

Active	Internal Name	Display Name	Permission Code
<input checked="" type="checkbox"/>	SS_EMPLOYER_ITEM_DEMOGRAPHICS	View Employer Information	Writable
<input type="checkbox"/>	SS_EMPLOYER_ITEM_BILLING_ENTITY	View/Update Payroll Calendar	Writable
<input type="checkbox"/>	SS_EMPLOYER_ITEM_WORK_REPORTING	Review Employer Reports, Billing History & Payments	Writable
<input type="checkbox"/>	SS_EMPLOYER_ITEM_PAYMENTS	Process Your Online EFT Payments	Writable

Pages

Active	Page Name	Display Name	Permission
<input checked="" type="checkbox"/>	EmployerPages:EmployerDemographics	Demographics	Writable
<input type="checkbox"/>	Client:EmployerAdditionalInformation	Additional Information	Writable
<input type="checkbox"/>	EmployerPages:EmployerContacts	Contacts	Writable

- Select the permission codes for the menu, window and page.
- Click **Save**.

Notes

[illegible]

Part 2

Adding new employer users



Part 2: Adding new employer users

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Adding an existing contact as a user

Home » Administration Functions : **View/Update User Information**

View/Update Employer Users | Add Employer User | User Actions | Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Employer Contacts

Add | Delete

Active	Username	Name	Status
<input checked="" type="radio"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="radio"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="radio"/>	wnelson	NELSON, WILLIAM	Suspended
<input type="radio"/>	dmclain	MCCLAIN, DIANE	Active
<input type="radio"/>	Create Account	WINTERS, SUZANNA	Not yet Activated
<input type="radio"/>	jfreitag	FREITAG, JOEL	Active
<input type="radio"/>	jklein	KLEIN, JILL	Active
<input type="radio"/>	igordon2	GORDON, IRENE	Active
<input type="radio"/>	Create Account	BRADLEY, MONIKA	Not yet Activated

- View/Update User Information: Launching point for adding and maintaining users
 - All of the employer contacts are listed on this window
 - To add an existing contact look for the Create Account link



Demonstration 2

Adding an existing contact as a user

Step 1: Identify the existing contact.

Home » Administration Functions » **View/Update User Information**

View/Update Employer Users | Add Employer User | User Actions | Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Employer Contacts

Add | Delete

Active	Username	Name	Status
<input checked="" type="radio"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="radio"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="radio"/>	wnelson	NELSON, WILLIAM	Suspended
<input type="radio"/>	dmcclain	MCCLAIN, DIANE	Active
<input type="radio"/>	Create Account	WINTERS, SUZANNA	Not yet Activated
<input type="radio"/>	jfreitag	FREITAG, JOEL	Active
<input type="radio"/>	iklein	KLEIN, JILL	Active
<input type="radio"/>	igordon2	GORDON, IRENE	Active
<input type="radio"/>	Create Account	BRADLEY, MONIKA	Not yet Activated

- Contacts become MyTRS users when the security administrator creates a user account. To create a user account, you follow a four-step process:
 - Select a contact with the **Create Account** link in the username.
 - Add employer user.
 - Set up user actions.
 - Establish security.
- For each employer contact, the following information displays:
 - The username, or the MyTRS login identification
 - “Create Account” if the contact does not have a MyTRS username.
 - The name of the employer’s contact
 - The Member Status which indicates whether the contact can access MyTRS:
 - **Active:** the contact is a MyTRS user.
 - **Inactive:** the contact is a MyTRS user, but access to MyTRS is no longer available.
 - **Not Yet Activated:** the contact does not have access to MyTRS as a user.
 - **Suspended:** the contact is a user, but access to MyTRS is currently suspended.

Demonstration 2: Adding an existing contact as a user (continued)

Step 2: Create a user account.

Home » Administration Functions : **View/Update User Information**

View/Update Employer Users | Add Employer User | User Actions | Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Employer Contacts

Add | Delete

+ Controls

Active	Username	Name	Status
<input checked="" type="radio"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="radio"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="radio"/>	wnelson	NELSON, WILLIAM	Suspended
<input type="radio"/>	dmcclain	MCCLAIN, DIANE	Active
<input type="radio"/>	Create Account	WINTERS, SUZANNA	Not yet Activated
<input type="radio"/>	jfreitag	FREITAG, JOEL	Active
<input type="radio"/>	jklein	KLEIN, JILL	Active
<input type="radio"/>	igordon2	GORDON, IRENE	Active
<input type="radio"/>	Create Account	BRADLEY, MONIKA	Not yet Activated

- To initiate the process of adding a new user who is already a MyTRS contact, click **Create Account**. The *Add Employer User* window will appear.
- The *View/Update Employer User* window is used to activate an employer user's account for an existing contact and to create new user accounts.

Demonstration 2: Adding an existing contact as a user (continued)

Step 3: Add the employer user.

Home » Administration Functions » View/Update User Information

View/Update Employer Users | **Add Employer User** | User Actions | Security

All fields are required. The password is case sensitive.

Account Profile Setup

Person: LUTHER, JESSICA

Username:

Enter New Password:

Confirm New Password:

Add Successful

The employer user has been successfully added.

- Enter username (e.g., first name initial + last name)
- Create a default initial password
- Clicking the **Create Account** link for a contact opens the Add Employer User window. You will be prompted to fill out the following fields:
 - **Username:** The unique identification created by the employer's security administrator. The suggested format is the first initial of the first name and the full last name (e.g., Lisa R Rose is lrose). If the username already exists, try using the first initial of the first name + middle initial + full last name (e.g., Lisa R Rose is lrrose), or a number after the username (e.g., lrose2).
 - **Enter New Password:** Enter the default password for the user. Passwords must meet MyTRS requirements.
 - **Confirm New Password:** Re-enter the password to verify and confirm the entry.
- Click **Submit**. A message will appear to indicate that the user has been added, and the User Actions window will then open (see next step).

Demonstration 2: Adding an existing contact as a user (continued)

Step 4: Checking user access information.

Home » Administration Functions » **View/Update User Information**

View/Update Employer Users Add Employer User User Actions Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

User Details

Username:
Password: ***** (Change)
Type: *
Reset Password Flag: ☒
Lock Account: ☐
Workflow Access: ☒

Title:
SSN:
Prefix:
First Name: *
Middle Name:
Last Name: *
Suffix:
Birth Date:
Gender: ☐ Female ☐ Male

Application

Application	Suspended
Employer Self Service	<input type="checkbox"/>

Business Entity List

Active	Employer Name	Contact Role
<input checked="" type="checkbox"/>	0110-LUCRETIA COFFIN MOTT CHARTER SCHOOL	<input type="text" value="Deduction Reporting"/> *

User Groups

Add Delete

Active	Department Name	Priority
<input checked="" type="checkbox"/>	Employer User	<input type="text" value="100"/>

* Universal Role

Subscriptions

Controls	Display Name
<input checked="" type="checkbox"/>	News

Save Delete

Demonstration 2: Adding an existing contact as a user (continued)

Step 5: Review the Subscriptions setting.

The screenshot shows a web application interface for managing user information. At the top, there is a navigation bar with the following links: Home » Administration Functions » View/Update User Information. Below this, there are four tabs: View/Update Employer Users, Add Employer User, User Actions, and Security. The 'User Actions' tab is currently selected. Below the tabs, there is a section labeled 'Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL'. The main content area is titled 'Subscriptions'. Below this title, there is a table with two columns: 'Control' and 'Display Name'. The table contains one row with a checked checkbox in the 'Control' column and the text 'News' in the 'Display Name' column. This row is highlighted with a red circle. At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

Control	Display Name
<input checked="" type="checkbox"/>	News

- The User Actions window displays the subscriptions for the employer user.
- At this time, this window is view-only for all employer users, and News is the only subscription available.
- By default, all employer users have access to the News subscription and the checkbox should already be checked for all users. However, the security administrator should ensure this checkbox is checked.
- Click **Save**. The Users list on the Security window will open. Select the user to proceed to set up access rights for the user (see next step).

Demonstration 2: Adding an existing contact as a user (continued)

Step 6: Establish security settings.

The screenshot shows the 'View/Update User Information' page in the MyTRS system. The breadcrumb trail is 'Home » Administration Functions » View/Update User Information'. Below this, there are four tabs: 'View/Update Employer Users', 'Add Employer User', 'User Actions', and 'Security'. The 'Security' tab is currently selected and highlighted with a red circle. Below the tabs, the section is titled 'Users'. A list box contains the following names: APPLEBAUM, AMANDA; BRENT, JOLI; FREITAG, JOEL; GORDON, IRENE; KLEIN, JILL; MCCLAIN, DIANE; and NELSON, WILLIAM. The name 'NELSON, WILLIAM' is highlighted with a red circle, indicating it is the selected user.

- Select the user.

Demonstration 2: Adding an existing contact as a user (continued)

Step 7: Establish security settings (continued).

Home » Administration Functions » **View/Update User Information**

View/Update Employer Users Add Employer User User Actions **Security**

Users

NELSON, WILLIAM

Menu Items

Active	Internal Name	Display Name	Permission Code
<input checked="" type="radio"/>	SS_EMPLOYER_MANAGEMENT_MENU	Employer Management	Writable
<input type="radio"/>	SS_EMPLOYER_MEMBER_MENU	Your Members	Writable
<input type="radio"/>	SS_EMPLOYER_ITEM_IMPORT_EXPORT	Import/Export Files	Writable
<input type="radio"/>	SS_EMPLOYER_ADMIN_MENU	Administration Functions	Writable

Hidden
Read-Only
Writable
Writable when new

Active	Internal Name	Display Name	Permission Code
<input checked="" type="radio"/>	SS_EMPLOYER_ITEM_DEMOGRAPHICS	View Employer Information	Writable
<input type="radio"/>	SS_EMPLOYER_ITEM_BILLING_ENTITY	View/Update Payroll Calendar	Writable
<input type="radio"/>	SS_EMPLOYER_ITEM_WORK_REPORTING	Review Employer Reports, Billing History & Payments	Writable
<input type="radio"/>	SS_EMPLOYER_ITEM_PAYMENTS	Process Your Online EFT Payments	Writable

Pages

Active	Page Name	Display Name	Permission
<input checked="" type="radio"/>	EmployerPages:EmployerDemographics	Demographics	Writable
<input type="radio"/>	Client:EmployerAdditionalInformation	Additional Information	Writable
<input type="radio"/>	EmployerPages:EmployerContacts	Contacts	Writable

- The *Security* window refreshes and displays the user's security permissions.
- To change the permission for a menu item of a window, click the Active radio button for the window.
- Select the Permission Code from the pull-down.
- Click **Save**.
- The security permissions are updated for the user.

Part 1: Managing existing employer users

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Adding a user who isn't a contact

Home » Administration Functions » View/Update User Information

View/Update Employer Users Add Employer User User Actions Security

Employer: 0110 LUCRETIA COFFIN MOTT CHARTER SCHOOL

Employer Contacts

Add Delete

Active	Username	Name	Status
<input checked="" type="checkbox"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="checkbox"/>	Create Account	CORDA, ROENA	Not yet Activated
<input type="checkbox"/>	wnelson	NELSON, WILLIAM	Suspended
<input type="checkbox"/>	dmcclain	MCCLAIN, DIANE	Active
<input type="checkbox"/>	Create Account	WINTERS, SUZANNA	Not yet Activated
<input type="checkbox"/>	ifreitag	FREITAG, JOEL	Active
<input type="checkbox"/>	iklein	KLEIN, JILL	Active
<input type="checkbox"/>	igordon2	GORDON, IRENE	Active
<input type="checkbox"/>	Create Account	BRADLEY, MONIKA	Not yet Activated

- View/Update User Information: Launching point for adding and maintaining users
 - You may need to add a user who is not a contact
 - Click on the **Add** button to initiate the process



Demonstration 3

Adding a new user who is not already a contact

Step 1: Start at the Add Employer User window.

Home » Administration Functions » View/Update User Information

View/Update Employer Users Add Employer User User Actions Security

All fields are required. The password is case sensitive.

New User

Username: *
 Password: *
 Confirm Password: *
 Type: Employer Business *
 Reset Password Flag: ☒
 Lock Account: ☐
 Workflow Access: ☒
 Title:
 SSN:
 Prefix:
 First Name: *
 Middle Name:
 Last Name: *
 Suffix:
 Birth Date:
 Gender: ☐ Female ☐ Male

Business Entity List

Active	Employer Name	Contact Role
<input checked="" type="checkbox"/>	0110-LUCRETIA COFFIN MOTT CHARTER SCHOOL	<input type="text"/>

Submit Cancel

- To get to the Add Employer User window, go to Home > Administration Functions > View/Update User Information and click on the second tab, Add Employer User:
- There are two main sections on this window:
 - New User
 - Business Entity List
- This creates a contact profile in MyTRS.
- The security administrator must notify the MTRS to enter the remaining information for the contact record.

Demonstration 3: Adding a new user who is not already a contact (continued)

Step 2: Provide basic account info.

New User

Username: *

Password: *

Confirm Password: *

Type: *

Reset Password Flag: ☒

Lock Account: ☐

Workflow Access: ☒

Title:

SSN:

Prefix:

First Name: *

Middle Name:

Last Name: *

Suffix:

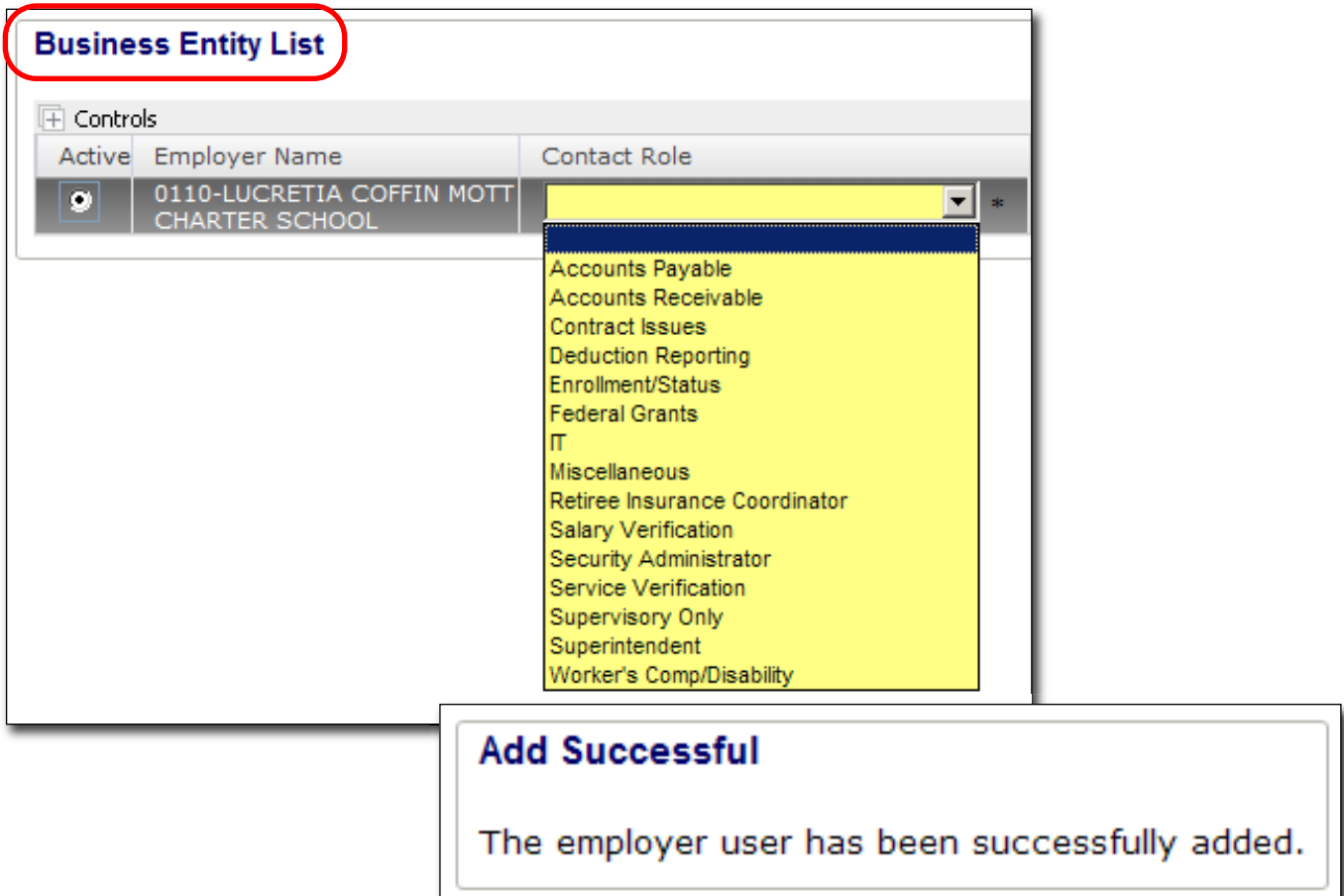
Birth Date:

Gender: ☒ Female ☐ Male

- Fill in **New User** fields following the guidelines for creating a username and password.
- The security administrator must notify the MTRS to enter the remaining information for the contact record.
- Fields in yellow and marked with an asterisk are required.
- Complete the fields in the New User section of the Add Employer User window.
- Enter a unique Username. The recommendation is the first initial and full last name (e.g., rbrown).
- Enter a default Password and retype it in the Confirm Password field. This must follow the password requirements (e.g., Password#1).
- Verify the Reset Password Flag checkbox is marked. When marked, this checkbox requires the user to change their password upon their next login.
- Select the Employer User Type from the pull-down field. The valid options for the user classification are: Employer Business and Employer Vendor.
- Enter the user's Title, Prefix, First Name, Last Name and Suffix.

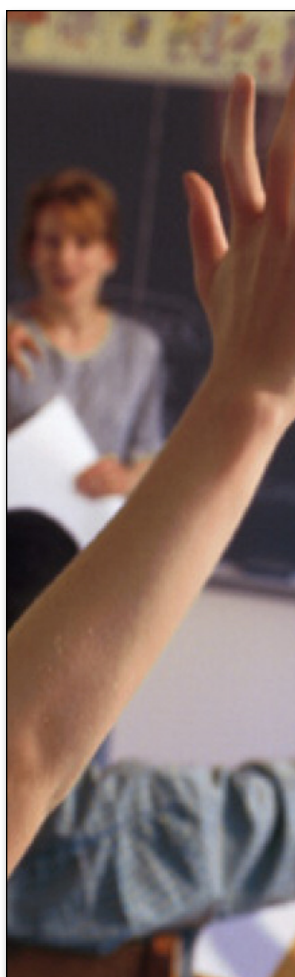
Demonstration 3: Adding a new user who is not already a contact (continued)

Step 3: Complete the Business Entity List.



The screenshot shows a web application window titled "Business Entity List". Inside, there is a table with columns "Active", "Employer Name", and "Contact Role". The "Employer Name" column contains the text "0110-LUCRETIA COFFIN MOTT CHARTER SCHOOL". The "Contact Role" column has a dropdown menu open, displaying a list of roles: Accounts Payable, Accounts Receivable, Contract Issues, Deduction Reporting, Enrollment/Status, Federal Grants, IT, Miscellaneous, Retiree Insurance Coordinator, Salary Verification, Security Administrator, Service Verification, Supervisory Only, Superintendent, and Worker's Comp/Disability. Below the table, a message box titled "Add Successful" displays the text "The employer user has been successfully added."

- Complete the Business Entity List section.
- Click **Submit**.
- A message window appears verifying the information is saved.
- You have now successfully added a user.
- Proceed to complete the Business Entity List section. Select the **Contact Role** for the user from the pull-down field (e.g., Accounts Payable).
- Click **Submit** to save the user's profile.
- A message window appears verifying the information saved and then the *View/Update Employer Users* tab automatically displays.
- Verify the new user appears in the Employer Contacts section of the *View/Update Employer Users* tab.
- You have completed adding a new employer user.



MyTRS Training

For Security Administrators

Questions?

[illegible]